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# Department of Defense INSTRUCTION

March 1, 1996  
NUMBER DoD 1205.21

USD(P&R)

SUBJECT: Reserve Component Incentive Programs Procedures

- References: (a) DoD Directive 1205.20, "Reserve Component Incentive Programs," January 8, 1996
- (b) DoD 7000.14-R, Volume 7, Part A, "DoD Financial Management Regulation (Military Pay, Policy, and Procedures--Active Duty and Reserve Pay)," December 19, 1994, authorized by DoD Directive 7000.14
- (c) Title 37, United States Code
- (d) Title 10, United States Code
- (e) through (i), see enclosure 1

## A. PURPOSE

This Instruction implements policy, assigns responsibilities, and prescribes procedures under reference (a) for management of the Reserve components incentive programs.

## B. APPLICABILITY

This Instruction applies to the Office of the Secretary of Defense, the Military Departments (including the Coast Guard when it is not operating as a Military Service in the Navy by agreement with the Department of Transportation), the Chairman of the Joint Chiefs of Staff, and the Defense Agencies.

## C. POLICY

It is DoD policy that:

1. Incentive skills shall be used to attract and retain individuals possessing or qualifying for training in critical skills and/or critical units needed in wartime and to sustain membership and maintain readiness in the National Guard and Reserve components.

2. Incentives shall be implemented in specific situations where other, less costly, methods have proven inadequate or ineffective and only as necessary to support unit and skill staffing requirements.

## D. RESPONSIBILITIES

1. The Under Secretary of Defense for Personnel and Readiness shall ensure that:

a. The Assistant Secretary of Defense for Reserve Affairs (ASD(RA)) monitors compliance with this Instruction and reference (a).

b. The Assistant Secretary of Defense for Health Affairs (ASD(HA)) monitors compliance for health professionals' incentives in this Instruction and reference (a).

2. The Under Secretary of Defense (Comptroller) shall ensure that:

a. The Military Departments are provided advice and assistance on all financial matters.

b. DoD 7000.14-R (reference (b)) is updated regularly with current Reserve component incentive information.

3. The Secretaries of the Military Departments and the Commandant of the Coast Guard shall publish guidance to implement this Instruction, DoD Directive 1205.20 (reference (a)), and applicable portions of reference (b) concerning program eligibility, dollar amounts, and recoupment procedures for Reserve component incentives.

#### E. PROCEDURES

1. Administration. This Instruction, supported by reference (a), addresses the Reserve Component Incentive Programs, authorized in Sections 302g, 308b through 308e, 308h, and 308i of 37 U.S.C. and Sections 16201 through 16203, 16301, and 16302 of 10 U.S.C. (references (c) and (d)). It shall be used with reference (b) for Reserve component incentive program management.

2. Written Agreements. As a condition of the receipt of an incentive covered by this Instruction, each recipient shall be required to sign a written agreement stating that the member has been advised of and understands the conditions under which continued entitlement to unpaid incentive amounts shall be terminated and which advance payments may be recouped. That agreement shall clearly specify the terms of the Reserve Service commitment that authorizes the payment of the incentive to the member. Services shall use the written agreements as in this Instruction. However, Service-specific agreements may be used, if they include all elements of the model agreements found in enclosures 3 through 13.

3. Eligibility Criteria and Program Amounts. See applicable portions of reference (b).

4. Authority. Authority to execute payment of all incentive programs included in this Instruction is subject to authorization in law and appropriation of funds. In cases where the authority for an incentive has an established termination date, Services shall not initiate new incentive agreements after that termination date unless the authority is renewed. If continuation of an authority is delayed, initiation of new incentive agreements shall also be delayed.

5. Eligible Specialties. The Secretary of the Military Department concerned and the Commandant of the Coast Guard shall determine eligible specialty skills for incentives. For health professionals, the eligible skills are at enclosure 14.

## 6. Relief from Termination

a. Persons who move from one location to another may continue bonus eligibility if they remain in the Selected Reserve of the same Military Department and are assigned to a bonus eligible unit or bonus eligible critical skill, as appropriate. Each Military Department shall endeavor to transfer a bonus recipient who moves to a new location into a similar Selected Reserve unit or one that can make use of the skill. For health specialists in the Selected Reserve, bonus or stipend recipients shall fill an existing vacancy. Failure to join another unit or find a position in the Selected Reserve in six months shall terminate the member from program eligibility. In the case of a member who is assigned to a bonus-qualifying position in 6 months or less, that period of time up to 6 months is added to the member's Service requirement.

b. Persons whose military specialty is changed at the convenience of the Government or whose unit is inactivated, relocated, reorganized, or converted (e.g., weapons systems conversion) may continue to be entitled to bonus payments provided they meet all other eligibility criteria, and are not separated from the Selected Reserve.

## 7. Nonavailability

a. Members of the Ready Reserve who incur a period of authorized nonavailability (i.e., temporary overseas residence, missionary obligation, or overseas employment obligation, etc.), as referenced in DoD Directive 1200.7 (reference (e)) shall be terminated, without concurrent recoupment, from their incentive. During the period of nonavailability, those persons shall not be entitled to subsequent incentive payments. If subsequently assigned to the Reserve status and skill that they had previously contracted for, members may be reinstated in the incentive program, if they extend their term of service, or contract for service, so as to be able to serve the full original incentive contract period. Entitlement to subsequent payments shall resume on the adjusted anniversary date of satisfactory and creditable Reserve Service, as appropriate. The date shall be adjusted for that period of nonavailability. Failure to extend in the Ready Reserve in a capacity for which previously contracted shall result in recoupment, as appropriate.

b. Members of the Selected Reserve may incur a period of authorized nonavailability for up to 1 year for valid personal reasons as determined by the Secretary of the Military Department concerned. These persons shall be assigned to the Individual Ready Reserve (IRR) or the Inactive National Guard (ING), as appropriate, during the period of nonavailability, and shall be terminated, without concurrent recoupment, from their incentive. During the period of nonavailability, the member shall not be entitled to subsequent payments or any other incentive available to members of the Ready Reserve not in the Selected Reserve. If within 1 year, members are subsequently reassigned to a Selected Reserve skill or unit type that they had previously contracted for, members may be reinstated in the incentives program, if they extend their term of service, or contract for service so as to be able to serve the full original incentive contract period. Entitlement to subsequent payments shall resume on the adjusted anniversary date of satisfactory creditable Selected Reserve service. The date shall be adjusted for that period of nonavailability. Failure to extend in the Selected Reserve in a capacity for which previously contracted shall result in recoupment, as appropriate.

8. Termination and Recoupment. If entitlement to an incentive is terminated for any reason before the fulfillment of the service described in the member's written agreement, that member shall not be eligible to receive any further incentive payments, except for payments for service performed before the termination date. Unless granted relief, as covered in subsections E.6. and E.7., above, the member must refund a prorata amount to the Government, if such termination is for any of the following reasons:

a. Fails to participate satisfactorily in required training during the entire period of service agreed to, in accordance with the written agreement, unless the failure to participate satisfactorily was due to reasons beyond the control of the member (e.g., death, injury, illness, or other impairment).

b. Separates from the Selected Reserve for any reason (including enlistment or voluntary order to active duty in the active forces). Exceptions to recoupment are in subsection E.9., below.

c. Moves to a nonbonus skill or unit, unless the move is required by the Reserve component.

d. Becomes a simultaneous member of an authorized officer commissioning program drawing a stipend.

e. Fails to extend the contracted term of service for a period of authorized nonavailability.

9. Exceptions to Recoupment. Recoupment is not required in the following circumstances when an incentive is terminated:

a. In the event of death, injury, illness, or other impairment not the result of the member's own misconduct.

b. If accepting an immediate appointment as an officer in a Reserve component, and have served more than 1 year of the incentive contract term.

c. If accepting an Active Guard and Reserve position or a military technician position where membership in a Reserve component is a condition of employment, and member has served at least 6 months of the incentive contract following receipt of the initial incentive payment.

d. If involuntarily separated from the Selected Reserve as a result of unit inactivation, relocation, reorganization, a DoD-directed reduction in the Selected Reserve force or an involuntary call-up or mobilization.

e. If authorized a period of nonavailability, provided the member extends the original period of commitment in the Reserve to serve the full contract period.

10. Calculation of Refund. Unless otherwise governed in law, referenced in subsection E.1., above, the amount to be refunded to the Government shall be calculated as follows:

a. The number of months served satisfactorily during the term for which an incentive was paid shall be multiplied by the monthly rate authorized by the particular incentive. That is calculated by dividing the total incentive amount by the number of months of Service the member has agreed to serve.

b. That calculated amount must be subtracted from the total incentive amount paid to the individual to date (initial and any subsequent payments).

c. If the calculation indicates overpayment to the individual, that amount must be recouped. If the calculation indicates that the member has earned more than the payments received to date (total of initial and any subsequent payments) on the same prorata basis, that amount shall be paid in the final installment.

d. Termination from an incentive or any refund made by an individual shall not affect the period of obligation to serve in the Reserve.

#### F. INFORMATION REQUIREMENTS

Specific data items for reporting incentives participants are explained in detail in DoD Instruction 7730.54 (reference (f)). New participants should be reported as of the date a contract has been signed, not the date payments begin.

#### G. EFFECTIVE DATE

This Instruction is effective immediately.



Edwin Dorn  
Under Secretary of Defense  
Personnel and Readiness

Enclosures - 14

1. References
2. Definitions
3. Written Agreement - Nonprior Enlistment Bonus
4. Written Agreement - Prior Service Enlistment Bonus
5. Written Agreement - Reenlistment Bonus
6. Written Agreement - Reenlistment or Voluntary Extension of Enlistment in Elements of the Ready Reserve other than the Selected Reserve

7. Written Agreement - Affiliation Bonus
8. Written Agreement - General Education Loan Repayment Program
9. Written Agreement - Health Professionals Loan Repayment Program
10. Written Agreement - Ready Reserve Healthcare Professions Stipend Program for Reserve Service Physicians and Dentists
11. Written Agreement - Ready Reserve Health Professions Stipend Program for Reserve Service Registered Nurses
12. Written Agreement - Ready Reserve Health Professions Stipend Program for Reserve Service Baccalaureate Students in Nursing or other Healthcare Services
13. Written Agreement - Special Pay for Selected Reserve Healthcare Professionals in Critically Short Wartime Specialties
14. Critical Skills for Health Professions Incentives - Wartime Healthcare Specialties With Critical Shortages

REFERENCES, continued

- (e) DoD Directive 1200.7, "Screening the Ready Reserve," April 6, 1984
- (f) DoD Instruction 7730.54, "Reserve Components Common Personnel Data System (RCCPDS)," January 17, 1995
- (g) DoD Directive 1304.25, "Fulfilling the Military Service Obligation," March 17, 1986
- (h) DoD Directive 1215.6, "Uniform Reserve, Training and Retirement Categories," December 18, 1990
- (i) DoD 1312.1-I, "DoD Occupational Conversion Index," September 1993, authorized by DoD Instruction 1312.1, August 9, 1995



## DEFINITIONS

1. Accredited Institution. Any educational institution that provides education at the post secondary level that is accredited by a nationally-recognized accrediting agency or association or by an accrediting agency or association recognized by the Secretary of Education. Included in this definition are those institutions that are in the process of seeking accreditation and currently have provisional or conditional accreditation, or candidacy status for accreditation.
2. Accredited Program. An educational program that is approved or by an agency or association recognized for such purpose by the Secretary of Education and/or by the Joint Commission on Accreditation.
3. Active Duty (AD). Full-time duty in the active Military Service of the United States. Such term includes full-time training duty, annual training duty, and attendance, while in the active Military Service, at a school designated as a Service school by law or by the Secretary of the Military Department concerned. Does not include full-time National Guard duty.
4. Active Duty for Training (ADT). A tour of AD that is used for training members of the Reserve components to provide trained units and qualified persons to fill needs of the Armed Forces during war or national emergency and such other times as national security requires. It includes annual training, special tours of ADT, school tours, and the initial duty for training performed by nonprior Service enlistees.
5. Active Guard and Reserve (AGR) Duty. Means active duty or full-time National Guard duty performed by a member of a Reserve Component of the Army, Navy, Air Force, or Marine Corps, or full-time National Guard duty performed by a member of the National Guard, pursuant to an order to active duty or full-time National Guard duty for a period of 180 consecutive days or more for the purpose of organizing, administering, recruiting, instructing, or training the Reserve Components. (See Section 101(d)(6)(B) of 10 U.S.C. (reference (d)) for exclusions.)
6. Active Status. Status of all Reservists except those on an Inactive Status List or in the Retired Reserve.
7. Anniversary Date. The date a Service member completes a year of service in the Ready Reserve in which the member's service has been satisfactory under this Instruction.
8. Armed Force. For this Instruction, the term "Armed Force" means the Army, the Navy, the Air Force, and the Marine Corps, to include their National Guard and Reserve components.
9. Critical Skill. Any military occupational specialty (MOS), rate, rating, or Air Force Specialty Code (AFSC) designated by the Secretary of the Military Department concerned as a skill that is needed to meet readiness requirements and for which, the Secretary of the Military Department concerned has determined, the use of an incentive would improve readiness posture.

10. Critical Wartime Health Specialty. Health professional commissioned officer specialties critical to the needs of the Services, as determined by the Assistant Secretary of Defense for Health Affairs (ASD(HA)).
11. Enlistment. An agreement for service in the Ready Reserve under Section 12103 of 10 U.S.C. (reference (d)).
12. Extension. Contracted agreement which lengthens a member's current enlistment for a stated period before the expiration of that enlistment in the Ready Reserve.
13. Inactive National Guard (ING). Consists of National Guard personnel in an inactive status in the Ready Reserve, not the Selected Reserve, attached to a specific National Guard unit.
14. Individual Ready Reserve (IRR). That element of the Ready Reserve of an Armed Force other than the Selected Reserve.
15. Initial Active Duty for Training (IADT). A term used to identify the mandatory training or the equivalent, as determined by the Secretary of the Military department concerned, each member of an Armed Force must complete on initial entry into the Military Service to qualify in a military specialty or branch, as required by Section 671 of reference (d) for deployability on land outside the United States and its territories and possessions during war.
16. Military Department. The Department of the Army, the Department of the Navy, and the Department of the Air Force.
17. Military Service Obligation (MSO). The total required service that each person who initially becomes a member of an Armed Force shall serve in that Armed Force unless sooner discharged, as prescribed by DoD Directive 1304.25, (reference (g)).
18. Ready Reserve. The Ready Reserve is comprised of military members of the National Guard and Reserve, organized in units or as individuals, and liable for order to AD during war or national emergency. The Ready Reserve consists of three subcategories; i.e., the Selected Reserve, the IRR, and the ING as defined in DoD Directive 1215.6 (reference (h)).
19. Reenlistment. A second or subsequent enlistment in a Reserve component.
20. Secondary School Graduate. For this Instruction, that term is limited to the following:
  - a. High School Graduate - High School Diploma. A diploma is issued to an individual who has attended and completed a 12-year or-grade day program of instruction. That diploma must be issued from the school where the individual is credited with the completion of program requirements.
  - b. High School Graduate - Adult Education Diploma. A secondary school diploma awarded for attending and completing an adult education or "external" diploma program, regardless of

whether the diploma was issued by the State or by a secondary or postsecondary educational institute.

c. Alternate Credit Holder - Test-Based Equivalency Diploma. A diploma or certificate of General Education Development (GED) or other test-based high school equivalency diploma. That includes statewide testing programs such as the California High School Proficiency Examination (CHSPE), whereby examinees may earn a certificate of competency or proficiency. A state or locally issued secondary school diploma obtained solely on the basis of such equivalency testing is not to be considered a high school diploma.

d. Alternative Credit Holder - Home Study Diploma. A secondary school diploma or certificate typically awarded by a state, based on certification by a parent or guardian that an individual has completed his and/or her secondary school at home.

21. Selected Reserve. That part of the Ready Reserve consisting of Reserve units, as designated by the Secretary concerned, and of individual Reservists, in pay status, required to participate in IDT periods and annual training. The Selected Reserve also includes Active Guard and Reserve and Individual Mobilization Augmentees (IMA) personnel as well as Reservists performing initial ADT. (See Section 10143 of 10 U.S.C. (reference (d)).)

22. Temporary Assignment as a Military Technician. For this Instruction, a military technician assignment is considered to be temporary when the assignment is for a period of less than 6 months and there is no expectation of continued employment as a military technician beyond that date.

23. Unsatisfactory Participation. Failure to fulfill the contractual obligation or service agreement as a member of the Ready Reserve. Participation is unsatisfactory when members of Selected Reserve units acquire at least nine unexcused absences from scheduled training within a 12-month period. Participation is also unsatisfactory if members of the Ready Reserve fail to meet the standards prescribed by the Military Departments concerned for annual screening, attendance at ADT, or training advancement. It includes misconduct for military offenses, or performance of duty.

WRITTEN AGREEMENT  
NONPRIOR ENLISTMENT BONUS

A. ACKNOWLEDGMENT

In connection with my enlistment in the (Name of Reserve Component) under the Selected Reserve Incentive Program, I hereby acknowledge that:

1. I meet the eligibility criteria, as follows:

a. I am enlisting into the Selected Reserve for a period of 6 years to be trained in a critical skill and/or assigned to a critical unit, which is approved for bonus entitlement by the Secretary of the Military Department concerned.

b. I have never previously served in any component of the Armed Forces of the United States, or have previously served, but did not successfully complete Initial Active Duty for Training (IADT).

c. I am a secondary school graduate.

d. I have been classified as Test Score Category Armed Forces Qualification Test (AFQT) Category I, II, or III.

e. I am not enlisting to qualify for a military technician or Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment (temporary assignment as a military technician is excluded).

f. I am not enlisting for continuous active duty (AD) service.

2. I incur the obligations of this enlistment, as follows:

a. I am enlisting for a period of 6 years in the Selected Reserve with a Military Service Obligation of 8 years.

b. I shall serve satisfactorily, as prescribed by the Service regulations and this written agreement for the entire period of my enlistment.

c. I further obligate to serve in the same Military Department and in the same critical skill or unit for which the bonus is approved, unless excused for the convenience of the Government.

3. I shall receive an enlistment bonus of \_\_\_\_\_ with an initial payment of \_\_\_\_\_ (an amount not to exceed one-half of the total bonus) to be paid upon my satisfactory completion of IADT, including military specialty qualification or sufficient training to be deployable. I shall

receive the remainder of the bonus in periodic installments of \_\_\_\_\_ or in a lump sum in the amount of \_\_\_\_\_.

4. If my entitlement to further bonus payments is terminated for any reason before fulfillment of my contract and obligation, I shall not be eligible to receive any further bonus payment. I shall refund a prorata amount to the Government if such termination is for the following reasons:

a. I fail to participate satisfactorily in training with the Selected Reserve, during the entire period of enlistment, unless the failure to participate satisfactorily was due to reasons beyond my control (i.e., death, injury, illness, or other impairment).

b. I separate from the Selected Reserve for any reason (including enlistment or voluntary order to AD in the active forces); other than by death, injury, illness or other impairment not the result of my own misconduct, except under the following conditions:

(1) I am accepting an immediate appointment as an officer in the Ready Reserve, and have served more than 1 year of the incentive contract term.

(2) I am accepting a military technician or AGR position where membership in a Reserve component is a condition of employment, and I have served at least 6 months of the bonus contract following receipt of the initial bonus payment (temporary assignments as a technician are excluded).

(3) I am involuntarily separated from the Selected Reserve as a result of unit inactivation, relocation, reorganization, or a DoD-directed reduction in the Selected Reserve force.

(4) I am authorized a period of nonavailability.

c. I voluntarily move to a nonbonus eligible critical skill or unit without the express direction of the Reserve component.

d. I become a simultaneous member of an authorized officer commissioning program drawing a stipend.

e. I fail to extend the contracted term of service for a period of authorized nonavailability.

5. The amount to be reimbursed shall be computed, as follows:

a. The number of months I have served satisfactorily during the term for which my bonus has been paid shall be multiplied by the monthly rate authorized by the particular bonus (calculated by dividing the total bonus amount by the number of months of service the member has agreed to serve).

b. That amount shall be subtracted from the total amount of bonus paid to me to date (initial and any subsequent payments).

c. If the calculation indicates overpayment to me, I shall refund that amount to the Government of the United States. If the calculation indicates that I have earned more than I have been paid at the prorata share, I shall receive a final payment in that amount.

6. Termination from bonus entitlement and/or any refund made by me shall not affect my period of obligation to serve in the Ready Reserve.

7. If I incur a period of authorized nonavailability, I shall extend my period of enlistment in the Ready Reserve in order to be able to serve the full contract period in the Selected Reserve. I shall not be eligible for subsequent payments during the period of authorized nonavailability. Entitlement to subsequent payments shall resume on the anniversary date of satisfactory, creditable Selected Reserve Service, as appropriate.

#### B. UNDERSTANDING

I have read and understand each of the statements above and the statements contained in DD Form 4, "Enlistment/Reenlistment Document--Armed Forces of the United States," (May, 1988), (if applicable) signed by me, and understand that they are intended to constitute all promises or agreements whatsoever concerning my enlistment. Any other promise, representation, or commitment made to me in connection with my enlistment is written in section C., below, in my own handwriting or is hereby waived. (If none, write "none.")

#### C. AUTHENTICATION

1. Signature of recruiting official and date \_\_\_\_\_
2. Signature of enlistee and date \_\_\_\_\_
3. Typed name and grade of witnessing officer \_\_\_\_\_
4. Signature and date \_\_\_\_\_

WRITTEN AGREEMENT  
PRIOR SERVICE ENLISTMENT BONUS

A. ACKNOWLEDGMENT

In connection with my enlistment in the (Name of Reserve component) under the Reserve Components Incentives Program, I hereby acknowledge that:

1. I meet the eligibility criteria, as follows:

a. I am enlisting in the Selected Reserve for a period of 3, 4, 5, or 6 years in a critical skill that is approved for bonus entitlement by the Secretary of the Military Department concerned.

b. I have completed any active Military Service Obligation (MSO) and have less than 10 years (exactly) of total Military Service from my pay entry base date upon execution of this written contract.

c. I am not being released from active Service for enlistment in a Reserve component (does not include transfer to the Ready Reserve, in accordance with a member's MSO).

d. I received an honorable discharge at the conclusion of active Military Service.

e. I have not previously been paid a bonus for enlistment, reenlistment, or extension of enlistment in a Reserve component, and the specialty associated with the position I am projected to occupy is a specialty in which I successfully served while on active duty (AD) and attained a level of qualification commensurate with my grade and years of Service.

f. I am not enlisting to qualify for a military technician or an Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment (temporary assignment as a military technician is excluded).

g. I am not enlisting for continuous AD Service.

2. I shall incur the obligations of this enlistment, as follows:

a. I am enlisting for a period of 3 or 6 years in the Selected Reserve. If I enlist for four or five years, this action will be handled as if it were a three year enlistment.

b. I shall serve satisfactorily, as prescribed by the Service regulations and this written agreement for the entire period of my enlistment.

c. I further obligate to serve in the same Military Department and in the same critical skill for which the bonus is approved, unless excused for the convenience of the Government.

3. I shall receive an enlistment bonus, as follows:

a. An enlistment bonus of \_\_\_\_\_ with an initial lump sum payment of \_\_\_\_\_ for a 3-year contract.

b. An enlistment bonus of \_\_\_\_\_ with an initial lump sum payment of \_\_\_\_\_ for a 6-year contract.

c. Anniversary payments of \_\_\_\_\_ on the first through the third anniversary if I am qualified for the 3-year enlistment bonus, or on the first through the sixth anniversary if I am qualified for a 6-year enlistment bonus, paid following satisfactory completion of Service for the preceding year.

4. If my entitlement to further bonus payments is terminated for any reason before fulfillment of my contract and obligation, I shall not be eligible to receive any further bonus payment. I shall refund a prorata amount to the Government if such termination is for the following reasons:

a. I fail to participate satisfactorily in training with the Selected Reserve, during the entire period of enlistment, unless the failure to participate satisfactorily was due to reasons beyond my control (i.e., death, injury, illness, or other impairment).

b. I separate from the Selected Reserve for any reason (including enlistment or voluntary order to AD in the active forces); other than by death, injury, or illness or other impairment not the result of my own misconduct, except under the following conditions:

(1) I am accepting an immediate appointment as an officer in the Ready Reserve, and have served more than 1-year of the incentive contract term.

(2) I am accepting a military technician or an AGR position where membership in a Reserve component is a condition of employment, and I have served at least 6 months of the bonus contract following receipt of the initial bonus payment (temporary assignments as a technician are excluded).

(3) I am involuntarily separated from the Selected Reserve as a result of unit inactivation, relocation, reorganization, or a DoD-directed reduction in the Selected Reserve force.

(4) I am authorized a period of nonavailability.

c. I voluntarily move to a nonbonus eligible critical skill or unit without the express direction of the Reserve component.

d. I become a simultaneous member of an authorized officer commissioning program drawing a stipend.



e. I fail to extend the contracted term of Service for a period of authorized nonavailability.

5. The amount to be reimbursed shall be computed, as follows:

a. The number of months I have served satisfactorily during the term for which my bonus has been paid shall be multiplied by the monthly rate authorized by the particular bonus (calculated by dividing the total bonus amount by the number of months of service the member has agreed to serve).

b. That amount shall be subtracted from the total amount of bonus paid to me to date (initial and any subsequent payments).

c. If the calculation indicates overpayment to me, I will refund that amount to the Government of the United States. If the calculation indicates that I have earned more than I have been paid at the prorata share, I shall receive a final payment in that amount.

6. Termination from bonus entitlement and/or any refund made by me shall not affect my period of obligation to serve in the Ready Reserve.

7. If I incur a period of authorized nonavailability, I shall extend my period of enlistment in the Ready Reserve to be able to serve the full contract period in the Selected Reserve. I shall not be eligible for subsequent payments during the period of authorized nonavailability. Entitlement to subsequent payments shall resume on the anniversary date of satisfactory, creditable Selected Reserve service, as appropriate.

## B. UNDERSTANDING

I have read and understand each of the statements above and the statements contained in DD Form 4, "Enlistment/Reenlistment Document--Armed Forces of the United States," (May, 1988), (if applicable) signed by me, and understand that they are intended to constitute all promises or agreements whatsoever concerning my enlistment or extension of enlistment. Any other promise, representation, or commitment made to me in connection with my enlistment is written in section C., below, in my own handwriting or is hereby waived. (If none, write "none.")

## C. AUTHENTICATION

1. Signature of recruiting official and date \_\_\_\_\_
2. Signature of enlistee and date \_\_\_\_\_
3. Typed name and grade of witnessing officer \_\_\_\_\_
4. Signature and date \_\_\_\_\_

WRITTEN AGREEMENT  
REENLISTMENT BONUS

A. ACKNOWLEDGMENT

In connection with my reenlistment or extension in the (name of Reserve Component) under the Reserve Components Incentives Program, I hereby acknowledge that:

1. I meet the eligibility criteria, as follows:

a. I am reenlisting or voluntarily extending my enlistment for service in the Selected Reserve for a period of 3, 4, 5, or 6 years in a critical skill and/or critical unit, which is approved for bonus entitlement by the Secretary of the Military Department concerned.

b. I have completed less than 10 years (exactly) of total Military Service, from my pay entry base date on execution of this written contract.

c. I have not previously received a Selected Reserve reenlistment bonus.

d. I am not reenlisting or extending to qualify for a military technician or an Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment (temporary assignment as a military technician is excluded).

e. I am not enlisting for continuous AD Service.

f. I hold the military grade and skill qualification commensurate with the vacancy (in authorized substitution limits, as prescribed by the Reserve component).

g. I have been a satisfactory participant in the Selected Reserve.

2. I will incur the obligations of this enlistment, as follows:

a. I am reenlisting or voluntarily extending my enlistment for a period of 3 or 6 years in the Selected Reserve. If I enlist for four or five years, this action will be handled as if it were a three year enlistment.

b. I shall serve satisfactorily, as prescribed by the Service regulations and this written agreement for the entire period of my enlistment.

c. I further obligate to serve in the same Military Department and in the same critical skill for which the bonus is approved, unless excused for the convenience of the Government.

3. I shall receive a reenlistment or extension bonus as follows:

a. An initial payment of \_\_\_\_\_, if my reenlistment or extension qualifies me for a 3-year reenlistment or extension bonus.

b. An initial payment of \_\_\_\_\_, if my reenlistment or extension qualifies me for a 6-year reenlistment or extension bonus.

c. Anniversary payments of \_\_\_\_\_, on the first through third anniversary if I am qualified for the 3-year reenlistment or voluntary extension bonus, or upon the first through sixth anniversary if I am qualified for a 6-year reenlistment or voluntary extension bonus shall be paid following satisfactory completion of service for the preceding year.

4. If my entitlement to further bonus payments is terminated for any reason before fulfillment of my contract and obligation, I shall not be eligible to receive any further bonus payment. I shall refund a prorata amount to the Government if such termination is for the following reasons:

a. I fail to participate satisfactorily in required training with the Selected Reserve, during the entire period of reenlistment/extension, unless the failure to participate satisfactorily was due to reasons beyond my control (i.e., death, injury, illness, or other impairment).

b. I separate from the Selected Reserve for any reason (including enlistment or voluntary order to AD in the active forces); other than by death, injury, illness or other impairment not the result of my own misconduct, except under the following conditions:

(1) I am accepting an immediate appointment as an officer in the Ready Reserve, and have served more than 1 year of the incentive contract term.

(2) I am accepting a military technician or an AGR position where membership in a Reserve component is a condition of employment, and I have served at least 6 months of the bonus contract following receipt of the initial bonus payment (temporary assignments as a technician are excluded.)

(3) I am involuntarily separated from the Selected Reserve as a result of unit inactivation, relocation, reorganization, or a DoD-directed reduction in the Selected Reserve force.

(4) I am authorized a period of nonavailability.

c. I voluntarily move to a nonbonus eligible military specialty or a nonbonus eligible unit without the express direction of the Reserve component.

d. I become a simultaneous member of an authorized officer commissioning program drawing a stipend.

e. I fail to extend the contracted term of service for a period of authorized nonavailability.

5. The amount to be reimbursed shall be computed, as follows:

a. The number of months I have served satisfactorily during the term for which my bonus has been paid shall be multiplied by the monthly rate authorized by the particular bonus

(calculated by dividing the total bonus amount by the number of months of service the member has agreed to serve).

b. That amount shall be subtracted from the total amount of bonus paid to me to date (initial and any subsequent payments).

c. If the calculation indicates overpayment to me, I shall refund that amount to the Government of the United States. If the calculation indicates that I have earned more than I have been paid at the prorata share, I shall receive a final payment in that amount.

6. Termination from bonus entitlement and/or any refund made by me shall not affect my period of obligation to serve in the Ready Reserve.

7. If I incur a period of authorized nonavailability, I shall extend my period of enlistment in the Ready Reserve to be able to serve the full contract period in the Selected Reserve. I shall not be eligible for subsequent payments during the period of authorized nonavailability. Entitlement to subsequent payments shall resume on the anniversary date of satisfactory, creditable Selected Reserve Service, as appropriate.

#### B. UNDERSTANDING

I have read and understand each of the statements above and the statements contained in DD Form 4, "Enlistment/Reenlistment Document--Armed Forces of the United States," (May, 1988), (if applicable) signed by me, and understand that they are intended to constitute all promises or agreements whatsoever concerning my enlistment. Any other promise, representation, or commitment made to me in connection with my reenlistment or extension is written in section C., below, in my own handwriting or is hereby waived. (If none, write "none.")

#### C. AUTHENTICATION

1. Signature of reenlisting official and date \_\_\_\_\_
2. Signature of reenlistee and date \_\_\_\_\_
3. Typed name and grade of witnessing officer \_\_\_\_\_
4. Signature and date \_\_\_\_\_

WRITTEN AGREEMENT  
REENLISTMENT OR VOLUNTARY  
EXTENSION OF ENLISTMENT IN ELEMENTS OF  
THE READY RESERVE OTHER THAN THE SELECTED RESERVE

A. ACKNOWLEDGMENT

In connection with my enlistment, reenlistment, or voluntary extension of enlistment in the (name of Reserve component) under the Individual Ready Reserve (IRR) or the Inactive National Guard (ING) bonus program, I hereby acknowledge that:

1. I meet the eligibility criteria, as follows:

a. I am reenlisting, or extending my enlistment in the IRR or ING for a period of 3 or 6 years beyond any other Military Service Obligation (MSO) in a critical skill which is approved for bonus entitlement by the Secretary of the Military Department concerned.

b. I have satisfactorily completed any original term of enlistment in the Armed Forces.

c. I hold the military grade and skill qualifications commensurate with the requirement, (within authorized substitution limits, as prescribed by the Reserve component).

d. I have not completed more than 14 years (exactly) of total Military Service from my pay entry base date on execution of this written contract.

2. I shall incur the obligations of this reenlistment, or voluntary extension as follows:

a. I am reenlisting or extending my current enlistment in the IRR or ING for a period of 3 or 6 years.

b. I shall serve satisfactorily, as prescribed by the Service regulations and this written agreement for the full term of enlistment or voluntary extension.

c. I further obligate to serve in the same Military Department and in the same critical skill for which this bonus is approved, unless excused for the convenience of the Government.

d. As a matter of continued entitlement, I shall respond to all official military correspondence and ensure that the National Guard unit or Reserve Personnel Center to which I am assigned (name and address listed on last page of this contract) remains informed of my current address, marital status, number of dependents, civilian employment, and any change in my physical condition in accordance with Section 10205 of 10 U.S.C.

e. As a condition of receipt of this bonus, I agree to participate in an annual Reserve muster or in active duty for training (ADT), as may be required, by the Military Department concerned.

f. For members with a remaining MSO: By accepting this bonus, I incur an obligation to serve (3 or 6) years after completion of my MSO, in the IRR unless excused by proper authority.

g. For members who do not have a remaining MSO: By accepting this bonus, I incur an obligation to serve (3 or 6) years in the IRR or the ING unless excused by proper authority.

3. I shall receive an reenlistment or extension bonus, as follows:

a. A bonus of \_\_\_\_\_, which shall be paid in 3 equal annual increments of \_\_\_\_\_, to be paid following satisfactory completion of service of the preceding year, for a 3-year contract.

b. A bonus of \_\_\_\_\_, if my reenlistment or extension qualifies me for a 6-year bonus. One third shall be paid at the time of the reenlistment, or extension of enlistment; and the remainder shall be paid in equal increments of \_\_\_\_\_, to be paid following satisfactory completion of service of the proceeding year, for a 6-year contract.

4. If my entitlement to further bonus payments is terminated for any reason before fulfillment of my contract and obligation, I shall not be eligible to receive any further bonus payments. I shall refund a prorata amount to the Government if such termination is for the following reasons:

a. I fail to participate satisfactorily in training with the IRR or the ING, during the entire period of reenlistment or voluntary extension, unless the failure to participate satisfactorily was due to reasons beyond my control (i.e., death, injury, illness, or other impairment).

b. I separate from the IRR or ING as an enlisted member due to discharge, or transfer from the IRR to the Selected Reserve, or accept voluntary orders to AD in the active forces for any reason (including enlistment or voluntary order to AD in the active forces) except under the following conditions:

(1) I am accepting an immediate appointment as an officer in the Ready Reserve, and have served more than 1 year of the incentive contract term.

(2) I am accepting a military technician or Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment, and I have served at least 6 months of the bonus contract following receipt of the initial bonus payment (temporary assignments as a technician are excluded).

(3) I am involuntarily separated from the IRR or the ING as a result of a reorganization or a DoD-directed reduction in the IRR or the ING force.

(4) I am authorized a period of nonavailability.

c. I voluntarily move to a nonbonus eligible critical skill without the express direction of the Reserve component.

d. I become a simultaneous member of an authorized officer commissioning program drawing a stipend.

e. I fail to extend the contracted term of service for a period of authorized nonavailability.

5. The amount to be reimbursed shall be computed, as follows:

a. The number of months I have served satisfactorily during the term for which my bonus has been paid shall be multiplied by the monthly rate authorized by the particular bonus (calculated by dividing the total bonus amount by the number of months of service the member has agreed to serve).

b. That amount shall be subtracted from the total amount of bonus paid to me to date (initial and any subsequent payments).

c. If the calculation indicates overpayment to me, I shall refund that amount to the Government of the United States. If the calculation indicates that I have earned more than I have been paid at the prorata share, I shall receive a final payment in that amount.

6. Termination from bonus entitlement and/or any refund made by me shall not affect my period of obligation to serve in the IRR.

7. If I incur a period of authorized nonavailability, I shall extend my period of enlistment in the Ready Reserve to be able to serve the full contract period. I shall not be eligible for subsequent payments during the period of authorized nonavailability. Entitlement to subsequent payments shall resume on the anniversary date of satisfactory, creditable IRR service, as appropriate.

#### B. UNDERSTANDING

I have read and understand each of the statements above and understand that they constitute all promises or agreements whatsoever concerning my eligibility and/or entitlement to an IRR reenlistment bonus. Any other promise, representation or commitments made to me in connection with an IRR reenlistment bonus are written in section C., below, in my own handwriting or are hereby waived. (If none, write "none.")

#### C. AUTHENTICATION

Statement of Commissioned Officer Administering Oath of Reenlistment. I certify that I have counseled or, if counseling is not feasible, have provided written responses to the applicant, in section B., above, concerning his or her obligations under this agreement.

1. Signature of reservist and date\_\_\_\_\_

2. Name and rank of officer administering oath\_\_\_\_\_

3. Signature and date\_\_\_\_\_

4. Reserve Personnel Center or National Guard representative (include address)\_\_\_\_\_

5. Signature and date\_\_\_\_\_



WRITTEN AGREEMENT  
AFFILIATION BONUS

A. ACKNOWLEDGMENT

In connection with my affiliation in the (Name of Reserve component) under the Selected Reserve Incentive Program, I hereby acknowledge that:

1. I meet the eligibility criteria, as follows:

a. I am affiliating with the Selected Reserve for the remaining period of my Military Service Obligation (MSO) skill that is approved for bonus entitlement by the Secretary of the Military Department concerned.

b. I am currently serving on active duty (AD) and have 180 days or less remaining on my AD obligation, or I have served on AD and was discharged or released under honorable conditions. I have a Reserve obligation under Section 651 of 10 U.S.C.

c. I am not affiliating to qualify for a military technician or Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment (temporary assignment as a military technician is excluded).

d. I am not affiliating for continuous AD service.

e. I possess the military grade and skill qualification commensurate with the vacancy (within authorized substitution limitations, as prescribed by the Reserve component).

f. I hold and am qualified in a critical skill designated by the Secretary of the Military Department concerned for bonus entitlement.

g. I am eligible for reenlistment or voluntary extension in my AD status.

h. I have not previously received an affiliation bonus for service in the Selected Reserve.

i. I have completed satisfactorily any term of enlistment or period of obligated AD service.

2. I shall incur the obligations of this affiliation, as follows:

a. I have exactly \_\_\_\_\_ years \_\_\_\_\_ months remaining on my MSO and do hereby agree to serve in the Selected Reserve for the full period of that obligation.

b. I shall serve satisfactorily, as prescribed by the appropriate regulations of the (name of Reserve component), the complete affiliation period in a Selected Reserve of the (name of Re-

serve component) according to my written agreement and in the critical occupational skill in which affiliated, unless excused for the convenience of the Government.

3. I shall be paid an affiliation bonus, as follows:

a. If at the time of discharge or release from AD, I have 18 months or less Reserve service obligation remaining, I shall receive a bonus of \_\_\_\_\_. The entire amount to be paid on signing of the Selected Reserve agreement and affiliation with the Selected Reserve.

b. If I have more than 18 months of my Reserve service obligation, I shall receive a bonus of \_\_\_\_\_. Payment to be received as follows:

(1) One-half of the total bonus to be paid on execution of the Selected Reserve agreement.

(2) The remaining one-half to be paid on the date of the sixth anniversary of my original enlistment or call to AD. If I have over 6 years of active service, the remaining one-half is payable on the date of the seventh anniversary of my original enlistment or call to AD (for example, member has 6 years and 3 months active duty and affiliates for the remainder of his or her MSO (1 year and 9 months)).

c. Instead of the payment procedures in paragraph A.3.a., through subparagraph A.3.b.(2), above, the bonus may be paid in monthly installments in such amounts, as determined by the Service. Monthly payments shall begin after the first month of satisfactory service and are payable only for those months in which I serve satisfactorily, as determined by the Secretary of the Military Department concerned.

4. If my entitlement to further bonus payments is terminated for any reason before fulfillment of my contract and obligation, I shall not be eligible to receive any further bonus payments. I shall refund a prorata amount to the Government if such termination is for the following reasons:

a. I fail to participate satisfactorily in training with the Selected Reserve, during the entire period of affiliation, unless the failure to participate satisfactorily was due to reasons beyond my control (i.e., death, injury, illness, or other impairment).

b. I separate from the Selected Reserve for any reason (including enlistment or voluntary order to AD in the active forces); other than by death, injury, illness or other impairment not the result of my own misconduct, except under the following conditions:

(1) I am accepting an immediate appointment as an officer in the Ready Reserve, and have served more than 1 year of the incentive contract term.

(2) I am accepting a military technician or an AGR position where membership in a Reserve component is a condition of employment, and I have served at least 6 months of the bo-

nus contract following receipt of the initial bonus payment (temporary assignments as a technician are excluded.)

(3) I am involuntarily separated from the Selected Reserve as a result of unit inactivation, relocation, reorganization, or a DoD-directed reduction in the Selected Reserve force.

(4) I am authorized a period of nonavailability.

c. I voluntarily move to a nonbonus eligible skill without the express direction of the Reserve component.

d. I become a simultaneous member of an authorized officer commissioning program drawing a stipend.

e. I fail to extend the contracted term of service for a period of authorized nonavailability.

5. The amount to be reimbursed shall be computed as follows:

a. The number of months I have served satisfactorily during the term for which my bonus has been paid shall be multiplied by the monthly rate authorized by the particular bonus (calculated by dividing the total bonus amount by the number of months of service the member has agreed to serve).

b. That amount shall be subtracted from the total amount of bonus paid to me to date (initial and any subsequent payments).

c. If the calculation indicates overpayment to me, I shall refund that amount to the Government of the United States. If the calculation indicates that I have earned more than I have been paid at the prorata share, I shall receive a final payment in that amount.

6. Termination from bonus entitlement and/or any refund made by me shall not affect my period of obligation to serve in the Ready Reserve.

7. If I incur a period of authorized nonavailability, I shall extend my period of enlistment in the Ready Reserve to be able to serve the full contract period in the Selected Reserve. I shall not be eligible for subsequent payments during the period of authorized nonavailability. Entitlement to subsequent payments shall resume on the anniversary date of satisfactory, creditable Selected Reserve service, as appropriate.

B. UNDERSTANDING

I have read and understand each of the statements above and the statements contained in DD Form 4, "Enlistment/Reenlistment Document--Armed Forces of the United States," (May, 1988), (if applicable) signed by me, and understand that they are intended to constitute all promises or agreements whatsoever concerning my affiliation. Any other promise, representation, or commitment made to me in connection with my affiliation is written in section C., below, in my own handwriting or is hereby waived. (If none, write "none.")

C. AUTHENTICATION

1. Signature of recruiting official and date\_\_\_\_\_
2. Signature of affiliating member and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_

WRITTEN AGREEMENT  
GENERAL EDUCATION LOAN REPAYMENT PROGRAM

A. ACKNOWLEDGMENT

In connection with my (enlistment, reenlistment or extension) in the (Name of Reserve component), I hereby acknowledge that:

1. I meet the eligibility criteria, as follows:

a. If enlisting as a nonprior service member, I have scored under the Armed Forces Qualification Test in test score category I, II, or III. Additionally, I fully understand that I shall not become entitled to the initial loan repayment, or any subsequent repayment of my qualifying student loans, until such time as I have graduated from secondary school and completed Initial Active Duty for Training (IADT), including military specialty qualification or sufficient training to be deployable.

b. I am not (enlisting, reenlisting, or extending) to qualify for an Active Guard Reserve (AGR) position or a military technician position where membership in a Reserve component is a condition of employment (temporary assignment as a technician is excluded).

c. I am (enlisting, reenlisting or extending) for assignment in a critical skill approved for loan repayment by the Secretary of the Military Department concerned, and currently hold that specialty or, if enlisting, shall meet critical skill qualification on completion of IADT, and agree to serve the entire enlistment in that critical skill unless removed for the convenience of the Government.

2. I incur the obligations of this contractual commitment, as follows:

a. I am (enlisting, reenlisting or extending) for a period of \_\_\_\_\_ years in a critical skill as designated for loan repayment entitlement. If this is my initial enlistment as a nonprior service member, I have selected the 6-year enlistment option. If I am prior service, I have selected the 3-or-more-year enlistment, reenlistment, or extension option.

b. I shall serve satisfactorily, as prescribed by the regulations of the (name of Reserve component), the obligated term in the Selected Reserve, under paragraph A.2.a., above, according to my DD Form 4, "Enlistment/Reenlistment Document--Armed Forces of the United States," (May, 1988), and this written agreement unless expressly excused for the convenience of the Government.

3. I understand that loan repayment shall apply to me, as follows:

a. The Government shall repay a designated portion of any outstanding loan(s) I have secured after October 1, 1975 in accordance with Section 16301 of 10 U.S.C.

b. As an enlisted member of the Selected Reserve, the portion or amount of the loan(s) when totaled together, that may be repaid is \_\_\_\_\_, for each year of satisfactory service completed during this contractual commitment after the loan(s) was and/or were made.

c. Repayment of any such loan shall be made after each complete year of satisfactory service performed beginning with this contractual commitment.

d. The total amount that may be repaid on all loans, shall not exceed \_\_\_\_\_. Loans in default at time of enlistment shall not qualify for repayment under this program.

e. This program shall not repay any amounts paid by me or any other Agency.

4. I understand that my eligibility under this program continues unless or until I do one of the following:

a. Transfer to an ineligible military specialty, unless at the express direction of the Service concerned.

b. Separate from the Selected Reserve for any reason (including appointment, or voluntary order to active duty in the active forces).

c. Accept a military technician or AGR position where membership in a Reserve component is a condition of employment (except for temporary assignment as a military technician).

d. Fail to participate satisfactorily in required training in the Selected Reserve, in accordance with Service regulations and this Instruction.

e. Fail to extend the contracted term of service for a period of authorized nonavailability.

5. If I incur a period of authorized nonavailability I shall be suspended from the loan repayment program and shall not receive subsequent payments during the period of suspension. To regain eligibility for further payments, I must extend my commitment in the Ready Reserve in order to be able to serve the full contract period in the Selected Reserve. Entitlement to subsequent payments shall resume on the anniversary date of satisfactory creditable Selected Reserve service adjusted for the period of nonavailability.

6. It shall be my responsibility to coordinate with my Selected Reserve official concerning the type loan, the educational institution, and the anticipated payout schedule as soon as feasible.

## **B. UNDERSTANDING**

I have read each of the statements in section A., above, and understand that they are intended to constitute all promises or agreements whatsoever concerning my Loan Repayment Program entitlement. No other promise, representation, or commitment in connection with my enlistment,

reenlistment, or extension entitlement to this incentive, or any waiver thereof, is hereby agreed to, except as written in section C., below in my own handwriting. (If none, write "none.")

C. AUTHENTICATION

1. Signature of (re)enlisting official and date\_\_\_\_\_
2. Signature of (re)enlistee and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_

WRITTEN AGREEMENT  
HEALTH PROFESSIONALS LOAN REPAYMENT PROGRAM

A. ACKNOWLEDGMENT

I, (name of applicant), hereby apply for participation in the Loan Repayment Program for Health Professionals in the Selected Reserve of the (name of Reserve component). In support of this application, I acknowledge the following:

1. I meet the following eligibility criteria:

a. I was first appointed, assigned or designated for service as a commissioned officer of an Armed Force on \_\_\_\_\_.

b. I possess the professional qualifications in a health profession that the Secretary of Defense has determined to be critically needed to meet identified wartime combat medical skill shortages.

c. I possess a current valid and unrestricted medical or nursing license, and such additional medical privileges as are required to practice as a health professional in the critical specialty for which loan repayment participation is authorized.

d. I am not affiliating to qualify for an Active Guard Reserve (AGR) position or a military technician position where membership in a Reserve component is a condition of employment. (Temporary assignment as a technician is excluded.)

2. I understand that the loan repayment program for health professional commissioned officers shall apply to me, as follows:

a. The Government shall repay portions of outstanding loans I have secured on or after October 1, 1975 in accordance with Section 16302 of 10 U.S.C. In addition, qualifying educational loans which I receive hereafter may also qualify for repayment under this program.

b. The amount of the qualifying loans that may be repaid, when totaled together, may not exceed \_\_\_\_\_ annually for each year of satisfactory service performed as a commissioned officer in the Selected Reserve. Payments shall be made to the promissory note holder beginning with the first anniversary date following the signed agreement to participate in that program. The total amount that may be repaid on all loans, on behalf of any person, shall not exceed \_\_\_\_\_. Loans that have been issued for less than 1 year or were in default on execution of this written agreement do not qualify for repayment.

c. Repayment of any such loans under this program shall be made after each year of satisfactory service performed as a commissioned officer in the Selected Reserve, beginning with the date of signing of this contractual agreement.



d. This program shall not reimburse amounts paid by me or any other Agency. Repayment of any loan shall not exceed the outstanding balance.

3. I understand that my eligibility under this program continues unless or until I do one of the following:

a. Transfer to an ineligible military specialty or ineligible health professions specialty, unless at the express direction of the Service concerned.

b. Separate from the Selected Reserve for any reason (including appointment, or voluntary order to active duty in the active forces).

c. Accept a military technician or AGR position where membership in a Reserve component is a condition of employment (except for temporary assignment as a military technician).

d. Fail to participate satisfactorily in required training in the Selected Reserve, in accordance with Service regulations and this Instruction.

e. Fail to extend the contracted term of service for a period of authorized nonavailability.

f. Fail to maintain a current or unrestricted valid medical or nursing license, as required, and such additional medical certification and privileges as may be required to practice as a health professional in the critical specialty for which loan repayment participation is authorized.

4. I understand that my termination from the Loan Repayment Program for any of the reasons in this paragraph shall not relieve me from satisfying any military obligation imposed by any other law or regulation.

5. If I incur a period of authorized nonavailability, I shall be suspended from the Loan Repayment Program and I shall not receive payments during the period of suspension. To regain eligibility for further payments, I must extend my Selected Reserve commitment to serve the full qualifying period in the Selected Reserve. Entitlement to subsequent payments shall resume on the adjusted anniversary date of satisfactory Selected Reserve service (i.e., the date shall be adjusted for the period of authorized nonavailability).

6. It shall be my responsibility to coordinate with my Selected Reserve official concerning the type loan, the educational institution, and the anticipated payout schedule as soon as feasible.

B. UNDERSTANDING

I have read each of the statements in section A., above, and understand that they constitute all promises representations, and agreements concerning my loan repayment entitlement, except as specifically noted hereafter. No other promise, representation, or commitment, or any waiver thereof, is agreed to except as written in section C., below, in my own handwriting. (If none, write "none.")

C. AUTHENTICATION

1. Typed name and grade of applicant\_\_\_\_\_
2. Signature of applicant and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_

WRITTEN AGREEMENT  
READY RESERVE HEALTHCARE PROFESSIONS STIPEND PROGRAM  
FOR RESERVE SERVICE PHYSICIANS AND DENTISTS

A. ACKNOWLEDGMENT

I, (name of applicant), hereby apply for participation in the Stipend Program for physicians and dentists in the Ready Reserve of the (name of Reserve component). In support of this application, I acknowledge the following:

1. I meet the following eligibility criteria:

- a. I am a graduate of a medical or dental school.
- b. I am eligible for appointment, designation, or assignment as a medical or dental officer in the Reserve of the Armed Force concerned.
- c. If already commissioned, I have been performing satisfactory service as a commissioned officer in the Ready Reserve of the (name of Reserve component).
- d. I am enrolled, or have been accepted for enrollment, in a residency program for physicians in a medical specialty or dentists in a dental specialty designated by the Assistant Secretary of Defense for Health Affairs as a specialty critically needed by the (name of Military Department) in wartime.
- e. I possess a current, valid, and unrestricted license to practice medicine or dentistry, and such additional health professional privileges as are required to pursue professional training in the critical specialty for which assistance is being provided.
- f. I am not affiliating to qualify for a military technician or an Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment. (Temporary assignments as a technician are excluded.)

2. I understand that the Stipend Program shall apply to me, as follows:

- a. I shall receive the stipend rate in effect for participants in the Armed Forces Health Professional Scholarship Program under DoD 7000.14-R, if I have agreed to serve in the Selected Reserve, or one-half of the rate, if I have agreed to serve in the Individual Ready Reserve (IRR), for the period or the remainder of the period of the residency program in which I am enrolled. I understand that this rate is subject to annual adjustments on July 1, of each year, as determined by the Secretary of Defense. DoD 7000.14-R contains provisions for payment of this incentive.
- b. After completion of my residency training, I shall be required to perform satisfactorily in the Selected Reserve or the IRR (circle the one which corresponds to the amount of stipend to be received), in accordance with Service regulations. Satisfactory participation in the Selected

Reserve shall require at least 12 days of active duty (AD) each year. In the IRR, satisfactory participation shall require completion of at least 30 days of initial active duty for training within 12 months after I complete my residency training and not less than 5 days of AD each year until the obligation which I have incurred under this agreement is fully satisfied.

c. I shall incur a Selected Reserve or an IRR (circle the one which corresponds to the amount of stipend to be received) obligation of 2 years for each year or partial year for which stipend assistance is provided. Repayment of the obligation shall begin on completion of my residency training program and shall be in the (name of Reserve component) and in the medical specialty of (name of critically-short wartime specialty for which Stipend Program participation is approved), unless excused under "convenience of Government" criteria. However, no part of the obligation may be satisfied while I am participating in the Selected Reserve Loan Repayment Program and I must be able to fulfill required service obligations before my mandatory removal date.

d. I shall not be eligible for stipend payments before I have been appointed, designated or assigned as a medical or dental officer for service in the Ready Reserve.

e. If I fail to complete, for any reason, the residency training program for which stipend assistance is provided, or fail to complete an incurred obligation, I may be required, at the discretion of the Secretary of the Military Department concerned, to either:

(1) perform 1 year of active duty (AD) for each year (or part thereof) for which stipend assistance was provided; or

(2) repay the Government an amount equal to the total amount paid to me under the Stipend Program.

f. I shall be subject to such AD requirements as may be specified as a part of this agreement and to AD in time of war or national emergency as provided by law for members of the Ready Reserve.

3. I understand that my entitlement under this program continues unless or until I do one of the following:

a. Transfer to an ineligible military specialty or ineligible health professions specialty, unless at the express direction of the Service concerned.

b. Separate from the Selected Reserve for any reason (including appointment, or voluntary order to AD in the active forces).

c. Accept a military technician or an AGR position where membership in a Reserve component is a condition of employment (except for temporary assignment as a military technician).

d. Fail to participate satisfactorily in required training in the Selected Reserve, in accordance with Service regulations.

e. Fail to maintain a current or unrestricted valid medical or dental license, as required, and such additional certification and privileges as may be required to practice as a health professional in the critical specialty for which stipend participation is authorized.

f. Complete the contracted period of training or receive medical certification and privileges required to practice as a health professional in the critical specialty for which the stipend is authorized.

g. Am dropped from the Stipend Program for deficiency in specialty training or voluntarily stop training in the critical specialty designated for the Stipend Program.

4. I understand that my termination from the Stipend Program for any of the reasons stated in subsections A.1. through A.3., above, shall not relieve me of any military obligation imposed by any other law or regulation.

**B. UNDERSTANDING**

I have read each of the statements in section A., above, I and understand that they constitute all promises, representations, and agreements concerning my stipend entitlement, except as specifically noted hereafter. No other promise, representation, or commitment, or any waiver thereof, is agreed to, except as written in section C., below, in my own handwriting. (If none, write "none.")

**C. AUTHENTICATION**

1. Typed name and grade (if any) of applicant\_\_\_\_\_
2. Signature of applicant and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_

WRITTEN AGREEMENT  
READY RESERVE HEALTH PROFESSIONS STIPEND PROGRAM FOR RESERVE  
SERVICE REGISTERED NURSES

A. ACKNOWLEDGMENT

I, (name of applicant), hereby apply for participation in the Stipend Program for registered nurses in the Ready Reserve of the (name of Reserve component). In support of this application, I acknowledge the following:

1. I meet the following eligibility criteria:

- a. I am a registered nurse.
- b. I possess a current, valid and unrestricted nursing license and such additional nursing or clinical privileges as are required to pursue professional training in the critical specialty designated by the Assistant Secretary of Defense for Health Affairs as a specialty critically needed by the (name of Military Department) in wartime.
- c. I am eligible for appointment, designation, or assignment as a nurse in the Reserve of the Armed Force concerned.
- d. If already commissioned, I have been performing satisfactory service as a commissioned officer in the Ready Reserve of the (name of the Reserve component).
- e. I am enrolled, or have been accepted for enrollment, in an accredited nursing program in a medical specialty critically needed by the (name of the Military Department) in wartime.
- f. I am not affiliating to qualify for a military technician or an Active Guard Reserve position where membership in a Reserve component is a condition of employment. (Temporary assignments as a technician are excluded.)

2. I agree that the Stipend Program shall apply to me, as follows:

- a. I shall receive the stipend rate in effect for participants in the Armed Forces Health Professional Scholarship Program, if I have agreed to serve in the Selected Reserve, or one-half of the rate, if I have agreed to serve in the Individual Ready Reserve (IRR), for the period or the remainder of the period of the nursing specialty training program in which I am enrolled. I understand that this rate is subject to annual adjustments on July 1, of each year, as determined by the Secretary of Defense. The DoD 7000.14-R, contains provisions for payment of this incentive.
- b. On successful completion of my program, I shall be required to perform satisfactorily in the Selected Reserve or the IRR (circle the one which corresponds to the amount of stipend to be received), in accordance with Service regulations. Satisfactory participation in the Selected

Reserve shall require at least 12 days of active duty (AD) each year. In the IRR, satisfactory participation shall require completion of at least 30 days of initial active duty for training within 12 months after I complete my residency training and not less than 5 days of ADT each year until the obligation which I have incurred under this agreement is fully satisfied.

c. I shall incur a Selected Reserve or IRR (circle the one which corresponds to the amount of stipend to be received) obligation of 2 years for each year or partial year for which stipend assistance is provided. Repayment of the obligation shall begin on completion of my nursing specialty training program and shall be in the (name of Reserve component) and in the nursing specialty of (name of critically-short wartime nursing specialty for which Stipend Program participation is approved), unless excused under "convenience of Government" criteria.

d. I shall not be eligible for stipend payments before I have been appointed, designated, or assigned as a nurse for service in the Ready Reserve.

e. If I fail to complete for any reason the nursing specialty training program for which stipend assistance is provided, or fail to complete an incurred obligation, I may be required, at the discretion of the Secretary of the Military Department concerned, to either:

(1) Perform 1 year of active duty (AD) for each year (or part thereof) for which stipend assistance was provided.

(2) Repay the Government an amount equal to the total amount paid to me under the Stipend Program.

3. I understand that my entitlement under this program continues unless or until I do one of the following:

a. Transfer to an ineligible military specialty or ineligible health professions specialty, unless at the express direction of the Service concerned.

b. Separate from the Selected Reserve or IRR for any reason (including appointment, or voluntary order to AD in the active forces).

c. Accept a military technician or an AGR position where membership in a Reserve component is a condition of employment, except for temporary assignment as a military technician.

d. Fail to participate satisfactorily in required training in the Selected Reserve or IRR, in accordance with Service regulations.

e. Fail to maintain a current or unrestricted valid nursing license, as required, and such additional medical certification and privileges as may be required to practice as a nurse in the critical specialty for which stipend participation is authorized.

f. Complete the contracted period of service, or medical training required to practice as a nurse in the critical specialty for which the stipend is authorized.

g. Am dropped from the Stipend program for deficiency in specialty training or voluntarily stop training in the critical specialty designated for the stipend program.

4. I understand that my termination from the Stipend Program for any of the reasons stated in subsections A.1. through A.3., above, shall not relieve me of any military obligation imposed by any other law or regulation.

B. UNDERSTANDING

I have read each of the statements in section A., above, I and understand that they constitute all promises, representations, and agreements concerning my stipend entitlement, except as specifically noted hereafter. No other promise, representation, or commitment, or any waiver thereof, is agreed to, except as written in section C., below, in my own handwriting. (If none, write "none.")

C. AUTHENTICATION

1. Typed name and grade (if any) of applicant\_\_\_\_\_
2. Signature of applicant and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_



WRITTEN AGREEMENT  
READY RESERVE HEALTH PROFESSIONS STIPEND PROGRAM FOR  
RESERVE SERVICE BACCALAUREATE STUDENTS IN NURSING OR OTHER  
HEALTHCARE SERVICES

A. ACKNOWLEDGMENT

I, (name of applicant), hereby apply for participation in the Stipend Program for baccalaureate students in (specify nursing or name of other healthcare profession, as applicable) in the Ready Reserve of the (name of component). In support of this application, I acknowledge the following:

1. I meet the following eligibility criteria:

a. I am enrolled, or have been accepted for enrollment, as a third or fourth-year student in an accredited baccalaureate program leading to a degree in (specify nursing or name of other critically-short wartime healthcare profession critically needed by the Military Department approving this agreement).

b. On completion of my baccalaureate program, I shall be eligible for appointment, designation, or assignment as a Reserve officer for duty as a (military nurse or name of other healthcare professional, specify as applicable) in the Ready Reserve.

2. I agree that the Stipend Program shall apply to me, as follows:

a. I shall be entitled during the remaining period of my baccalaureate degree program in (specify nursing or other healthcare profession critically needed) to a monthly stipend at the rate of \_\_\_\_ per month. However, I shall not be eligible for stipend payments before I have enlisted in the Ready Reserve.

b. I shall be required to perform satisfactorily in the Ready Reserve, in accordance with Service regulations, after completion of my baccalaureate program. Satisfactory participation in the Selected Reserve shall require at least 12 days of active duty (AD) each year. In the Individual Ready Reserve (IRR), satisfactory participation shall require completion of at least 30 days of initial active duty for training within 12 months after I complete my baccalaureate program and not less than 5 days of ADT each year until the obligation that I have incurred under this agreement is fully satisfied.

c. I shall incur a Ready Reserve obligation of 1 year for each year or partial year for which stipend assistance is provided. Repayment of the obligation shall begin on completion of my baccalaureate degree program in (specify applicable program) and shall be in the (name of Reserve component) with duty as a (specify nurse or other critical healthcare specialist, as applicable), unless excused under "convenience of Government" criteria.

d. If I fail to complete for any reason the baccalaureate degree program for which stipend assistance is provided, or fail to complete an incurred obligation, I may be required, at the discretion of the Secretary of the military Department concerned, to either:

(1) Perform 1 year of AD for each year (or part thereof) for which stipend assistance was provided; or

(2) Repay the Government an amount equal to the total amount paid to me under the Stipend Program.

e. I shall be subject to AD in accordance with this agreement and in time of war or national emergency, as provided by the law for members of the Ready Reserve.

3. I understand that my entitlement under this program continues unless or until I do one of the following:

a. Transfer to an ineligible military specialty or ineligible health professions specialty, unless at the express direction of the Service concerned.

b. Separate from the Selected Reserve or IRR for any reason (including, appointment, or voluntary order to AD in the active forces).

c. Accept a military technician or an Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment (except for temporary assignment as a military technician).

d. Fail to participate satisfactorily in required training in the Selected Reserve or the IRR, in accordance with Service regulations and this Instruction.

e. Am dropped from the Stipend program for deficiency in my baccalaureate program in nursing or voluntarily stop training in the critical specialty designated for the stipend program.

f. Complete my baccalaureate degree, or receive medical certification and privileges as may be required to practice as a health professional in the critical specialty for which the stipend is authorized.

4. I understand that my termination from the Stipend Program for any of the reasons stated in subsection A.1. through paragraph A.3.f., above, shall not relieve me of any military obligation imposed by any other law or regulation.

## **B. UNDERSTANDING**

I have read each of the statements in section A., above, I and understand that they constitute all promises, representations, and agreements concerning my stipend entitlement, except as specifically noted hereafter. No other promise, representation, or commitment, or any waiver

thereof, is agreed to, except as written in section C., below, in my own handwriting. (If none, write "none.")

C. AUTHENTICATION

1. Typed name (if any) of applicant\_\_\_\_\_
2. Signature of applicant and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_

WRITTEN AGREEMENT  
SPECIAL PAY FOR SELECTED RESERVE HEALTHCARE  
PROFESSIONALS IN CRITICALLY SHORT WARTIME SPECIALTIES

A. ACKNOWLEDGMENT

I, (name of applicant), hereby apply for participation in the Selected Reserve recruitment bonus program in the (name of Reserve component). In support of this application, I acknowledge the following:

1. I meet the following eligibility criteria:

a. I am a graduate of an accredited school of medicine, dentistry, nursing, or physician assistant program.

b. I am qualified for appointment, designation, or assignment as a medical officer, dentist, nurse, or physician assistant in the Selected Reserve.

c. I am applying for a commission and appointment, designation or assignment as a medical officer, dental officer, nurse, or physician assistant in the Selected Reserve.

d. I possess a current valid and unrestricted medical, dental, nursing, or physician assistant license and such additional credentials and privileges as required to perform my duties in the critical specialty for which special pay is authorized.

e. I am fully qualified in the critically-short wartime specialty for which bonus program participation is approved.

f. I am not affiliating to qualify for a military technician or an Active Guard Reserve (AGR) position where membership in a Reserve component is a condition of employment. (Temporary assignments as a technician are excluded.)

g. I have not received this incentive in the past.

h. I am entering the Uniformed Services of the United States for the first time now, or I had served and was honorably discharged before April 28, 1989 and am entering now for the first time since that date.

2. I agree that the Selected Reserve Recruitment Bonus program shall apply to me, as follows:

a. I shall be entitled during the period of my agreement to an annual bonus, as determined by my specialty, of (specify dollar amount). I understand that this bonus shall be paid at the beginning of each period of Selected Reserve service as specified in paragraph A.2.c., below.

b. I shall be required to perform satisfactorily in the Selected Reserve, in accordance with Service regulations. Satisfactory participation in the Selected Reserve shall require at least 12 days of active duty (AD) each year.

c. I shall incur a Selected Reserve obligation of (specify 1, 2, or 3 years). Payback of the obligation shall begin immediately and shall be in the (name of Reserve component) and in the (name of specialty).

d. If I voluntarily terminate service in the Selected Reserve before the end of the period for which payment was made, I shall refund the full amount of the payment made for the period on which the payment was based.

3. I understand that my entitlement under this program continues unless or until I do one of the following:

a. Transfer to an ineligible military specialty or ineligible health professions specialty, unless at the express direction of the Service concerned.

b. Separate from the Selected Reserve for any reason (including appointment, or voluntary order to active duty in the active forces).

c. Accept a military technician or an AGR position where membership in a Reserve component is a condition of employment (except for temporary assignment as a military technician or).

d. Fail to participate satisfactorily in required training in the Selected Reserve, in accordance with Service regulations.

e. Fail to maintain a current or unrestricted valid medical, dental, physician assistant, or nursing license, as required, and such additional medical certification and privileges as may be required to practice as a health professional in the critical specialty for which bonus participation is authorized.

f. Complete the contracted period of service.

## **B. UNDERSTANDING**

I have read each of the statements in section A., above, I and understand that they constitute all promises, representations, and agreements concerning my stipend entitlement, except as specifically noted hereafter. No other promise, representation, or commitment, or any waiver thereof, is agreed to, except as written in section C., below, in my own handwriting. (If none, write "none.")

C. AUTHENTICATION

1. Typed name of applicant\_\_\_\_\_
2. Signature of applicant and date\_\_\_\_\_
3. Typed name and grade of witnessing officer\_\_\_\_\_
4. Signature and date\_\_\_\_\_

CRITICAL SKILLS FOR HEALTH PROFESSIONS INCENTIVES  
WARTIME HEALTHCARE SPECIALTIES WITH CRITICAL SHORTAGES<sup>1</sup>

PHYSICIANS

SURGEON<sup>2</sup>

GENERAL  
THORACIC  
CARDIOTHORACIC  
VASCULAR AND PERIPHERAL VASCULAR  
COLON-RECTAL

ORTHOPEDIC SURGEON

NEUROSURGEON

UROLOGY

ANESTHESIOLOGY

DIAGNOSTIC RADIOLOGY

PRIMARY CARE<sup>3</sup>

FAMILY PHYSICIAN

EMERGENCY MEDICINE

INTERNAL MEDICINE<sup>4</sup>

DENTIST

ORAL SURGEON

PHYSICIAN ASSISTANTS

NURSES

ANESTHESIA

OPERATING ROOM

MEDICAL-SURGICAL

<sup>1</sup> Personnel are eligible for incentives, when qualified, only when the billet to which they are recruited requires the specialty for which they shall receive incentive benefits.

<sup>2</sup> Surgeons included require as a minimum a 5-year residency in general surgery before sub-specialization.

<sup>3</sup> Officers in these specialties could fill specialty specific billet or a general medical officer, flight surgeon or field surgeon billet dependent on Service need.

<sup>4</sup> Subspecialties included under Internal medicine are limited to those listed in the DoD 1312.1-I (reference (i)) in category 6A12.